

AGENDA BILL

Beaverton City Council
Beaverton, Oregon

SUBJECT: Contract Award- Federal Relations Support **FOR AGENDA OF:** 08-08-17 **BILL NO:** 17161

Mayor's Approval: Denny Doyle

DEPARTMENT OF ORIGIN: Mayor

DATE SUBMITTED: 08-1-17

CLEARANCES: City Attorney Wen Blum
 CAO ME
 Purchasing Proctor
 Finance Proctor

PROCEEDING: CONSENT AGENDA
 (CONTRACT REVIEW BOARD)

EXHIBITS: 1. List of Proposers
 2. Scoring Matrix
 3. Submitted proposal

BUDGET IMPACT

EXPENDITURE	AMOUNT	APPROPRIATION
REQUIRED \$93,490	BUDGETED \$95,000	REQUIRED \$0

RECOMMENDED ACTION:

The City Council, acting as Contract Review Board, awards a contract for the Fiscal Year 2017-18 to CFM Strategic Communications, Inc., in the amount of \$93,490 to provide federal relations support on behalf of the City, renewable for four additional one-year periods at the City's option through FY 2022-2023 based on Council's approval of future budgets and City Attorney's approval of contract form. If the contract is extended for four additional years, the total estimated expenditure for this contract would be \$467,450.

HISTORICAL PERSPECTIVE:

The City has solicited for and used Federal Relations Support services since 2010. The City has worked with both Sustainable Strategies D.C. and Van Scoyoc Associates for these services.

INFORMATION FOR CONSIDERATION:

The City's Request for Proposal (RFP) for Federal Government Relations was advertised on March 24, 2017, in the Daily Journal of Commerce. Eighteen firms that provide this type of assistance downloaded the RFP from the City's website. The RFP closed at 2:00 PM on May 5th, 2017, and the City received seven proposals from the firms listed in Exhibit 1.

The Federal Relations Support services include:

1. Providing strategic, timely, and tactical advice relative to federal grant opportunities affecting the City and its community interests. Common issue areas include, but are not limited to, transportation, housing, land use, urban development and redevelopment, public safety, environment, tax credits, economic development, alternative energy, green building, court programs, cultural programs, and federal funding.
2. Advocating on behalf of the City before various federal regulatory, programmatic, and legislative bodies and conducting issue management as needed preparatory to such activities.
3. Assisting the City in prioritizing and developing priorities with City staff in all City departments.
4. Assisting the City in identifying and creating a list of a wide variety of grants funding sources that pertain to areas of interest of the City, including federal, foundation, and discretionary funding that relates to a variety of topics, particularly for energy, health, environmental justice, transportation, economic development, smart growth, urban renewal, and cultural programs.
5. Assisting the City in strategically shaping projects to be more competitive and match the availability of funding from federal programs and initiatives.
6. Assisting the City staff in identifying, writing, reviewing, and submitting grants to secure funding for community related projects.
7. Informing City staff in a timely manner about grant opportunities as they arise.
8. Assisting the City in developing and sustaining long-term substantive relationships with federal elected and appointed officials.
9. Facilitating meetings for City officials with various federal program officials in Beaverton as well as other parts of the nation.
10. Communicating with and providing ongoing reports and information to key staff in the City's Mayor's Office and Community Development Department.

The evaluation team reviewed and scored the submitted proposals based on the criteria outlined in the RFP that included knowledge and experience, project approach and understanding, relevant experience and references, M/W/SDV and ESB program, and price. Based on the scoring of the proposals, the evaluation team then conducted interviews of the top four proposals. CFM Strategic Communications, Incorporated was the top proposer of the interview process. If the Contract Review Board awards this contract, the contract will start in September 2017 for an amount not to exceed \$93,490. Joel Rubin, *Partner, Federal Affairs* would be the project manager. The contract term is for one year, with the option to renew for four additional one-year periods for a total term of five years.

Staff believes the investment the City makes in Federal Government Relations is a good value and recommends the Council award a contract to the firm of CFM Strategic Communications, Inc., to assist the City in its relationships with federal grant applications, federal officials and agencies.

City of Beaverton

PROPOSALS RECEIVED

FEDERAL RELATIONS SUPPORT
Solicitation #: 3203-17

Closed: May 5, 2017 @ 2:00 PM

Proposals Submitted:

- 1. Carpi & Clay, Inc. – Washington, DC**
- 2. CFM Strategic Communications (CFM), Inc. – Portland, OR**
- 3. Gail Greenman – West Linn, OR**
- 4. Smith Dawson & Andrews – Washington, DC**
- 5. Summit Strategies Government Affairs LLC – Washington, DC**
- 6. Sustainable Strategies DC – Washington, DC**
- 7. The Color Nine Group, LLC – Silver Spring, MD**

Federal Grant Support Scoring Sheet- Interview Round, RFP#3203-17B

Firm:	Average score out of three reviewers
CFM Strategic Communications, Inc.	82
Smith Dawson & Andrews	80
Carpi & Clay	69
Sustainable Strategies DC	72

COPY



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City of Beaverton
Federal Relations Support
Solicitation #3203 – 17B
(Closing May 5, 2017)



May 3, 2017

Submitted by:
CFM Strategic Communications (CFM), Inc.
An Oregon Corporation

CFM Contact:
Joel Rubin, Partner Federal Affairs
820 First Street NE, Suite 710
Washington, DC 20002
joelr@cfmdc.com
202.347.9171
503.294.9152(fax)



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May 3, 2017

City of Beaverton
Purchasing Division
Terry Muralt, Purchasing Agent
12725 SW Millikan Way
Beaverton, OR 97005

Re: RFP for Federal Relations Support #3203-17B

Dear Ms. Muralt:

Thank you for the opportunity to submit a proposal to represent the City of Beaverton in Washington, DC. On behalf of the CFM federal team, it would be an honor and a privilege to share Beaverton's unique story and develop an innovative federal agenda to build on the advocacy efforts you have employed over the years.

The CFM team we have selected for you has deep ties to each member of the Oregon delegation and proven, reliable contacts at the highest levels of government. As such, we can provide immediate added value to your government affairs operation and quickly implement a strategic agenda in a thoughtful and collaborative manner.

With respect to the projects and priorities of Beaverton, we know your issues and have a proven track record of succeeding in the areas that are important to you. We have a strong record of securing federal funds for community projects in a number of areas, including transportation, water infrastructure, economic development, police, fire and housing. In addition to securing federal funds, we have passed legislation, protected critical programs and built coalitions to ensure the objectives of our Oregon municipal clients are met.

We know you have developed a vision to improve the quality of life and livability for your residents and are engaged with your federal delegation. We want to add a comprehensive component to your lobby effort that will expand your reach into the Oregon delegation and the federal agencies that present opportunities for your city.

We work every angle for our clients. We will work closely with you to generate grassroots support and regional coordination to make your agenda more appealing to key officials. Members of Congress like to get involved with projects that have broad support and deliver real results. At CFM, we are experts in generating these coordinated ventures and know how important this approach is to achieving results.

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820 First Street, NE Suite 710
Washington, DC 20002
(202) 347-9170



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May 3, 2017

Terry Muralt, Purchasing Agent

Page Two

Thank you for your time and consideration. We look forward to hearing from you in the near future. As you consider our application, please direct all correspondence to:

Joel Rubin – Proposed Project Manager

Partner, Federal Affairs

CFM Strategic Communication, Inc.

820 First Street, NE Suite 710

Washington, DC 20002

joelr@cfmdc.com

(202) 347-9171

Sincerely yours,

A handwritten signature in black ink, appearing to read "Joel Rubin". The signature is fluid and cursive, with a prominent "J" and "R".

Joel Rubin

Partner, Federal Affairs

SECTION 6: SIGNATURE PAGE

[FILL OUT AND SUBMIT THIS PAGE WITH YOUR PROPOSAL]

This page must be signed with the full name and address of the Proposer submitting the response; if a partnership, by a member of the firm with the name and address of each member; if a corporation, by an authorized officer thereof in the corporate name.

The undersigned verifies that he/she is a duly authorized officer of the company, and that his/her signature attests that information provided in response to this Request for Proposal Solicitation #3203-17B is accurate.

The undersigned certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition.

The undersigned certifies that all addenda to the specifications have been received and duly considered and that all cost adjustments associated with the addenda are reflected in this proposal.

Addendum No(s) _____ Acknowledged?

☒ YES / ☐ NO

Resident Proposer as defined in ORS 279A.120(1)?*

☒ YES / ☐ NO

Proposers certify non-discrimination in accordance with ORS 279A.110(4).

☒ YES / ☐ NO

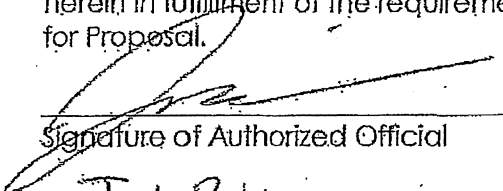
If awarded a contract pursuant to this solicitation, will Proposer participate in Intergovernmental Permissive Cooperative Purchasing (extend the terms, conditions and prices of such contract to other public agencies)? (If no, please explain on a separate piece of paper.

☒ YES / ☐ NO

Is your firm currently certified in the State of Oregon as an M/W/SDV/ESB enterprise?
If so, what Certifications do you hold and provide certification number. _____

☐ YES / ☒ NO

Proposer hereby makes this proposal to furnish goods and/or services at the price(s) indicated herein in fulfillment of the requirements and specifications of the City as stated in the Request for Proposal.


Signature of Authorized Official

Joel Rubin
Printed Name
code)

Partner, Federal Affairs
Title

5/1/2017
Date

202-347-9171
Telephone Number (with area

jrobin@ctrade.com
E-mail Address

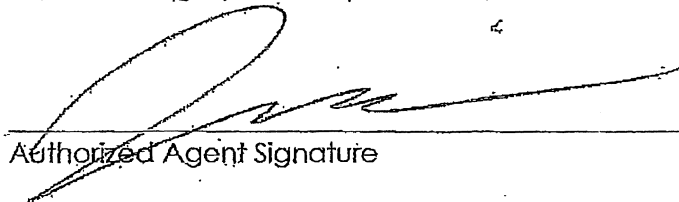
*Resident Bidder" means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state and has stated in the bid whether the bidder is a "resident bidder".

SECTION 7 - ATTESTATION of COMPLIANCE with TAX LAWS

[COMPLETE AND SUBMIT THIS PAGE WITH YOUR BID OR PROPOSAL]

I, Joel Rubin, representing CFM Strategic Communications
Insert printed name Insert name of firm
(Bidder/Proposer), hereby attest that:

1. I am an authorized agent of Bidder/Proposer, and I have full authority from Bidder/Proposer to submit this attestation and accept the responsibilities stated herein.
2. I have knowledge regarding payment of taxes of Bidder/Proposer, and to the best of my knowledge, Bidder/Proposer is not in violation of any Oregon tax laws, including, without limitation, ORS 305.620 and ORS chapters 316, 317 and 318.
3. Bidder/Proposer shall provide written notice to City within two business days of any change to its compliance with tax laws.


Authorized Agent Signature

5/1/2017
Date

Approved as to Form, Beaverton City Attorney – 04/04/2016



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4.3.1 KNOWLEDGE AND EXPERIENCE

4.3.1.1 Background of the Firm - CFM Strategic Communications – An Oregon Company

CFM Strategic Communications (CFM) is a fully integrated consulting firm with practice areas in federal and state lobbying, public relations, research and marketing communications. We are based in Oregon and have a full-time staff in Portland and Washington, DC. We have a team of experienced lobbyists who represent clients in Salem and the nation's capital. Our public affairs professionals have strong communications backgrounds and are backed up by communications specialists.

For more than twenty-five years, we have successfully represented clients in Oregon and Washington State helping them navigate the federal process, advocate for or against legislation and secure grants, appropriation projects and program plus-ups (adding money to existing accounts in order to fund more programs and projects). We have secured significant funds for our clients by crafting winnable projects and implementing targeted funding strategies.

We have developed comprehensive legislative agendas to give our clients the full breadth of federal representation. We have drafted, introduced and passed legislation, built and supported coalitions to advocate for policy changes and engaged the legislative and executive branches to ensure our client objectives are met.

CFM has maintained a physical presence in Washington, DC for the entire 26 years of the firm's existence. As a result, we have forged longstanding relationships with the Oregon delegation and key members and staff outside of the Northwest. Our deep network of contacts includes members on Appropriations, Transportation and Infrastructure, Environment and Public Works, Energy and Commerce and Resources Committees. In addition, we have close ties with congressional leadership, as well as the Departments of Transportation, Justice, Commerce, Health, Education, Agriculture, Defense, Energy, Labor, Army Corps of Engineers and Trump administration.

As your federal advocate, CFM will promote your interests in our nation's capital and arm you with the tools necessary to be successful in a constantly changing political environment. We will help you establish and maintain strong ties to key Members of Congress and the Executive Branch. We will assist you in understanding and participating in the federal governmental process and guide you through the grant and appropriations processes.

CFM will provide you with expert advice from a highly-regarded team with decades of experience. CFM's lobbyists have strong connections on Capitol Hill, access to influential policy makers and a comprehensive understanding of the issues facing the Pacific Northwest. We work with Oregon delegation members and staff on a daily basis. CFM partners and staff have known most members of the delegation for decades. We have been their political supporters and, in some cases, their political advisors.

We work with our clients to successfully influence legislation and guide complex initiatives through challenging obstacles. Our experienced professional team, network of contacts, expertise in working with



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federal, state and local governments and record of achievement make us uniquely qualified to represent the City of Beaverton.

When you choose CFM, you get a team of experts dedicated to fulfilling your needs. We are respected for our integrity, honesty and hard work in representing our clients. Moreover, we are respected for our outstanding record of achievements.

The CFM Advantage

CFM is more than a lobbying firm with great connections. We develop the right strategies, messages and presentations to position our clients' legislative objectives in the best light possible. CFM's trademark is strategic communications to help our clients say the right things to the right people at the right time to obtain the desired results.

We strongly believe in a comprehensive approach to representing our clients. We leave no rock unturned. We are very familiar with traditional funding streams and processes for securing federal funding, but we also approach each project with a fresh perspective. We continually ask ourselves what are the potential non-traditional funding streams? What other types of programs have not yet been considered? Are there collaborative efforts that would improve the chances of success? This type of creative approach has familiarized us with unique funding streams that have produced millions of dollars for our clients when traditional resources have come up dry.

It goes without saying that your initiatives will be competing with other entities in the Northwest and throughout the nation. With the current earmark moratorium in place, it is necessary to have clearly defined projects that pinpoint deliverables and meet the strict grant criteria that are more detailed in nature than the earmark process. It is more critical than ever to understand the important role members of Congress can play in influencing the process at the agency level and the key agency officials that can help guide your project successfully through the federal bureaucracy. We are experts at coordinating this comprehensive approach, and our record of success is clear.

Working with you, we will develop a set of policy, grant and appropriation priorities that will serve as your federal platform. These priorities will reflect the needs of your community and will be strategically interwoven with the pressing issues facing the federal government. We will help you communicate your platform to key Members of Congress and agency officials in a direct, concise and compelling manner. It is necessary to refine messages carefully and produce clear communication tools that will elevate the profile of Beaverton's requests over the many other justifiable requests competing for federal dollars. This is our specialty.

Instant Credibility

Other lobbying operations will boast of large Washington, DC offices and connections to "movers and shakers" in our nation's capital. There is no substitute for commitment, hard work and loyalty. But most important is our firm's credibility. Having CFM on your side provides an advantage. Unlike big DC firms, your



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delegation knows us and knows we are an Oregon firm that relies on our reputation. We are not putting forward projects that meet short-term objectives, hide complications and create longer-term challenges. In a funding environment facing public scrutiny, CFM representation means something to the Oregon delegation. That reliability is critical in the appropriations and legislative process.

CFM Office Locations:

Washington DC Office

820 First Street, NW
Suite 710
Washington, DC 20002
Contact: Joel Rubin (202.347.9171)

Oregon Office

1001 Fifth Avenue
Suite 1100
Portland, OR 97204
Contact: Norm Eder (503.294.9120)

4.3.1.2 Key Personnel

(i) Members of Team Beaverton (resumes attached)

CFM will dedicate a comprehensive team to the Beaverton account, including three federal lobbyists, one state lobbyist, two public affairs specialists, a grant specialist and a strategic advisor. Our team understands the needs of your city; has years of experience with your Congressional delegation and has close ties to key agency officials, staff and Members of Congress. Team Beaverton includes:

Joel Rubin, CFM Federal Affairs Partner, has over 17 years of experience working on federal issues in the Pacific Northwest. Joel will serve as the Project Manager and main point of contact for Team Beaverton. Joel knows the Oregon delegation well. Each Oregon Member has their unique areas of expertise and can be called on to champion particular projects or policy items important to Beaverton. Joel will work with you to craft your federal agenda, sync your priorities with the congressional delegation and provide a strategic roadmap to accomplishing your key objectives.

Based in DC, Joel will work on a daily basis with Oregon staffers to ensure your priorities are top of mind and receive the attention they deserve. He will monitor and advocate for and against important legislation moving through Congress and regularly report back to City officials. Joel will coordinate with other national and regional organizations in DC to leverage broader support for City priorities and align interests for broader policy initiatives.

Through his various municipal and public sector clients, Joel works closely with staff from DC and regional offices of the Departments of Transportation (FAA, FTA, FHWA), Justice, Energy, Agriculture, Commerce, National Parks Service, Corps of Engineers, NMFS and Environmental Protection Agency.

Joel served as Legislative Director to Congressman Brian Baird (D-WA), where he worked on a wide range of issues including transportation, taxes, trade, defense, energy, economics and budget. Joel was responsible for Baird's Transportation and Budget Committee assignments, managing the legislative agenda and coordinating the appropriations process. Joel leads the DC office and has been a registered lobbyist since 2005 representing nearly a dozen public and private sector clients. Joel has strong contacts in the Washington



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and Oregon delegations, the House Appropriations and Transportation Committees, the Senate Appropriations and Environment and Public Works Committees, Corps of Engineers and Departments of Justice, Transportation, Commerce, Labor, Housing, Homeland Security, Energy and Veterans Affairs.

Michael Skipper, CFM Federal Affairs Associate and Grant Specialist, will assist Joel on a day-to-day basis in DC and serve as the full-time grant specialist for the Beaverton account. Michael will coordinate DC trips for City officials to meet with the Congressional delegation, key committee staff and top federal agency officials. He maintains close working relationships with dozens of grant program staff at multiple federal agencies. As such, Michael will monitor daily grant announcements, prepare grant summaries, draft and edit grant applications as needed and secure letters of support for project submissions.

Michael brings valuable Pacific Northwest-focused policy and political experience to CFM's Washington, DC office. Prior to his current post, Michael was a part of CFM's State Affairs team during two annual legislative sessions in Oregon. Between legislative sessions, he pivoted from policy to politics and worked on both candidate and local levy campaigns in Corvallis and Sherwood.

Kirby Garrett will provide support to Joel on a day-to-day basis for the Beaverton account. Kirby is CFM Manager of Federal Affairs, based in Washington, DC.

Since 2011, Kirby worked for Oregon Congressman Greg Walden before recently joining the CFM Federal Affairs team. Kirby brings extensive Capitol Hill experience and knowledge of Pacific Northwest policy issues. A Bend native, Kirby worked his way up in the Walden office, starting as an intern before graduating to Field Representative in La Grande and moving to Washington, DC to become Walden's Legislative Assistant.

In the latter role, Kirby managed Walden's work on transportation, infrastructure, education, financial services, taxation, labor and housing issues. His achievements include helping Walden advance legislation to return commercial air service to Klamath Falls and ensuring bridges in the Columbia River Gorge National Scenic Area were eligible for vital federal transportation funding.

Page Phillips, Senior Public Affairs Associate, will serve as the local projects manager out of CFM's Portland office. Page will attend in-person meetings with City officials and other stakeholders in Oregon on an as-needed basis. Page is an operative with contacts throughout the Northwest. She works with local elected officials and business leaders on a daily basis. Page will use these vast connections to further your objectives. Page regularly attends public and private events and plans and coordinates them as well. Page will be your local go-to member of Team Beaverton. She will be able to communicate your objectives at the highest levels of federal agencies, with Members of Congress and local leaders.

Page brings more than 15 years of public policy and political experience from the Pacific Northwest and around the country. As Executive Director of the Columbia River Crossing Coalition, Page worked with a wide range of federal agencies, including the Corps of Engineers, Coast Guard and Department of Transportation



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(Maritime and Aviation). Page also worked closely with the Ports of Vancouver and Portland and numerous local governments, business and labor groups and neighborhood associations.

Before leading the CRC Coalition, Page was the Government Relations Director of the Pacific Northwest Waterways Association (PNWA). PNWA represents over 130 organizations in the public and private sectors in Washington, Oregon, Idaho and California. Members include public ports, navigation, transportation, international trade, tourism, agriculture, forest products, energy and governmental interests.

Page spent five years working in congressional offices in Southwest Washington, first for Congressman Brian Baird and then Senator Patty Murray. She spent five years in Washington, DC, first as an aide to Congresswoman Elizabeth Furse, then as a political consultant where one of her clients was Congressman Earl Blumenauer. She worked on political campaigns in Oregon, California and Colorado.

Dale Penn, Senior Associate, leads the firm's state lobbying practice and will coordinate lobbying and outreach activities in Salem. For over a decade Dale has developed strong relationships with legislators, agency personnel and Capitol staff. His focused areas are transportation, health care and human services. He has developed extensive partnerships with unions, industry leaders, grassroots advocates and consumer champions.

By building a large coalition, including a disparate group of stakeholders, Dale secured over \$20 million in additional senior and disabled transportation funding over the past two legislative cycles. These dollars went toward expanded transit routes, bus purchases and dial-a-ride services for vulnerable populations. Dale has substantial experience in the complicated Ways and Means Committee process, fighting in recent years to secure over \$2.5 million in budget allocations for transportation and transit projects in Tigard and Salem. Securing these funds requires strong relationships with key budget leaders, legislative staff and the governor's office. Dale spent nearly a decade on the budget committee for the Salem Area Mass Transit District learning the intricacies of transportation budget issues and is a valuable voice around the table on the 2017 transportation package conversation.

Norm Eder, a CFM Partner, has extensive experience working with all levels of government. Norm, based in CFM's Portland office, will assist Page as the local projects coordinator. He spent 17 years as Vice President of Public Affairs for Oregon Graduate Institute. During that time, he led all public affairs and communications for OGI. This included extensive federal and state advocacy that led to funding economic development, research, and infrastructure projects. He was involved in many of the major land use and transportation issues that shaped the Sunset Corridor. Since joining CFM in 1999, Eder has specialized in managing large complex client projects, in particular water infrastructure work for Clean Water Services and the Tualatin Water Supply Partners, as well as Clackamas County. Eder has been a long-time member of the Westside Economic Alliance Board. In the past, he has served on the Boards of the Beaverton Arts Commission and the Washington County Commission on Children and Families.

Gary Conkling will serve as a strategic advisor and primarily oversee state and local coordination on behalf of the Beaverton account. Gary is CFM's president, based in Portland. Gary co-founded CFM in 1990. Before



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starting CFM, Gary was director of public affairs for Tektronix, served as president of Beaverton Area Chamber of Commerce and worked in Washington, DC as Staff Director for Congressmen Les AuCoin and Ron Wyden, who is now Oregon's senior senator. He has more than 30 years' experience lobbying on the federal and state levels. He has been involved in many of Oregon's high-profile public policy debates and serves in many civic roles. Gary is an executive faculty member at Willamette University's Atkinson Graduate School of Management, teaching about communications and leadership.

(ii) Relationships with federal agency leaders

CFM works closely with dozens of agencies within the federal government, including the Departments of Transportation, Housing, Environmental Protection Agency, Commerce, Corps of Engineers, Bureau of Reclamation, Health and Human Services, Justice, Agriculture, Veterans Affairs and others.

Our close relationships allow us to offer our clients up-to-the-minute information on trends and funding streams. CFM regularly communicates with the Washington, DC and the regional offices of multiple agencies. Many issues can be resolved favorably for our clients at the local level where the needs and options for success are readily understood. If a visit to Washington is necessary, we will get you in to see those people who can make a difference.

Our intimate knowledge of the respective agencies allows us to steer many plans through the layers of bureaucracy that can thwart the best laid out projects. Having multiple municipal clients, we have a good perspective on how other metropolitan areas deal with shepherding projects through the federal government.

Proven Success – Agency Advocacy

CFM provides wide-ranging, comprehensive federal advocacy services. In addition to federal funding, CFM has a strong record of accomplishment working with agencies. Many times, our clients face complex challenges imposed on them by federal agencies. Complex issues typically involve numerous parties, stakeholders and bureaucratic roadblocks. Just in the last three years, CFM successfully managed four extremely complicated and timely issues for our clients.

CFM worked with Tigard, Lake Oswego, Senators Wyden and Merkley and Congressmen Schrader and Bonamici to speed up the issuance of a biological opinion from the National Marine Fisheries Service to complete a \$200 million-plus water project. NMFS failed to meet permit issuance deadlines, so CFM was called in to get the permit issued to avoid a delay that could have cost ratepayers \$1 million. After a month of coordination and nearly daily contact with federal agencies, the permit was issued.

CFM worked with the City of Vancouver, the Oregon and Washington congressional delegations, the Port of Portland and the FAA to ensure Pearson Field was not shut down due to last-minute regulations imposed by the FAA. Within days, working with stakeholders, CFM persuaded FAA headquarters in DC to delay implementation of strict regulations that would have significantly hampered operations at Pearson and PDX. One month later, the delay was made permanent.



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CFM worked with the Washington Congressional delegation to locate the first new Vets Center in over a decade within the Lacey city limits. The new Vets Center was the top priority for Lacey's Mayor. Despite budget constraints at the Veterans Administration, we were able to work through bureaucratic obstacles to establish the new center ensuring veterans in Thurston County receive the benefits and care they earned. The initial array of services includes Readjustment Counseling Services—a crucial function of the Veterans Health Administration (VHA)—and a broad range of other counseling, outreach and referral assistance to eligible Active Duty Service Members, Veterans, and their families.

CFM worked with Marion County, Aurora Airport staff, airport businesses, Oregon Department of Aviation, Congressman Schrader's staff and the FAA to lift the ban on Aurora night operations. After months of delays by the FAA, Marion County asked CFM to step in moments before several local airport users were planning to relocate their operations. Within days, CFM coordinated a congressional and state action plan that compelled the FAA to remove its flight restrictions.

(iii) Grant research, writing, editing and advocacy

Proven Success – Federal Funding

CFM has delivered real results to Oregon and Washington municipal clients for decades. With CFM, you will have a trusted partner that can hit the ground running to implement and achieve your legislative objectives. We have been successful in securing millions of federal dollars for transportation, housing, economic development, public safety, water, health, energy and Corps of Engineer projects across the region.

As the earmark environment has shifted, CFM has relied on its comprehensive approach to ensure that clients have unique access to federal funds through a variety of grant funding opportunities. We are only one of a handful of firms that keeps a dedicated Grant Specialist on staff to meet the changing needs of the federal funding environment. CFM's innovative and tireless strategy in this new reality includes aggressively pursuing grant funding, drafting and editing grant applications, inserting report language in appropriations bills and advocating for program "plus ups" that help our clients compete.

CFM conducts daily reviews of grant opportunities to locate programs that best address client needs. We have been developing relationships with federal agencies for years. Thus, we are often aware of funding streams before programs are announced enabling our clients to be fully prepared for otherwise short timelines. We put clients in touch with grant specialists who are experts in how to prepare a well-crafted grant request and provide guidance on how to proceed. Clients meet with these individuals face to face or via conference call and are able to learn ways to enhance their proposal, thereby increasing its competitiveness. CFM covers all aspects of the grant process from start to finish, including working with the congressional delegation and other stakeholders to secure letters of support on behalf of the project.

One of our most successful projects over the last few years, Vancouver's Downtown Waterfront Redevelopment Project, epitomizes CFM's way of doing business. We look under every rock, work every angle and clearly communicate with elected officials about the needs and benefits of worthy projects in the



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Pacific Northwest. We helped Vancouver secure more than \$13 million in federal earmarks, stimulus and six federal grant streams to revitalize its downtown area. We helped the city apply for funds, lobby the congressional delegation and agency officials on behalf of the project and coordinated a grassroots effort to mobilize support. This economic development and sustainable land-use success story is a model that can be replicated throughout the Northwest.

CFM has a strong track record of securing funds for public safety programs. Marion County's Kids First Initiative was a comprehensive advocacy strategy developed by CFM that paid dividends for our client. After several years of bringing projects to the Oregon delegation to combat the county's methamphetamine problem, CFM recognized an opportunity to position the project strategically for greater success, creating the Kids First and subsequent Kids First II Initiatives.

Through this creative packaging, the Oregon delegation has come to know and respect the Kids First initiative as an all-encompassing approach to breaking the intergeneration cycle of violence that is predicated by meth-addicted parents. The project has enjoyed broad support from the delegation. Delegation members regularly cite the Kids First program as a unique and successful model that they are proud to have their names associated with. To date, Marion County has received over \$6 million to fund the Kids First initiative and other anti-meth programs.

These projects above are just two examples of successful funding initiatives. Below, is a more expansive sampling of our grant successes over the last five years. Each successful grant has its own story, but the amount and diverse list of grants from more than a dozen sub-agencies should highlight our broad range of funding successes. Recent grant successes include the following:

- Marion County, Oregon
 - \$7.3 million Department of Transportation, Federal Lands Access Program: *North Fork Road*
 - \$3 million Department of Transportation, Interstate Maintenance: *Woodburn Interchange*
 - \$600,000 Department of Justice, Bureau of Justice Assistance: *Adult Offenders with Co-Occurring Substance Abuse and Mental Health Disorders*
 - \$268,779 Department of Justice, Community Oriented Policing Services (COPS): *One Police Officer*
 - \$296,200 Department of Justice, Office of Justice Programs: *Second Chance Act Adult Mentoring Grants to Nonprofit Organizations (Mid Valley Mentors, lead applicant)*
- City of Tigard, Oregon
 - \$2.1 million Economic Development Administration: *Hunziker Industrial Area*
 - \$400,000 Environmental Protection Agency, Brownfields Cleanup: *Downtown Redevelopment Project*
 - \$400,000 Environmental Protection Agency, Brownfields Assessment: *Downtown Redevelopment Project*
 - \$80,000 Department of Agriculture, Farmers Market Promotion: *Farmers Market Outreach Program*



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- City of Medford, Oregon (*new client in 2016*)
 - \$1.2 million Economic Development Administration: *Rogue Community College Facility Expansion*
- City of Vancouver, Washington
 - \$1.25 million Department of Justice, COPS Hiring: *10 New Police Positions*
 - \$134,771 Department of Homeland Security, Assistance to Firefighters: *Firefighter training*
 - \$500,000 Department of Transportation, Federal Lands Access Program: *Waterfront Trail Connection*
 - \$349,928 Department of Homeland Security, Assistance to Firefighters: *Fire Personal Protective Equipment*
 - \$493,000 Department of Justice, Community Oriented Policing Services (COPS): *COPS Child Sexual Predators Program*
 - \$750,000 Department of Transportation, Federal Highway Administration: *Waterfront Trail*
 - \$1 million Department of Housing, Brownfields Economic Development Initiative: *Downtown Waterfront Redevelopment Project*
 - \$2.3 million Department of Homeland Security, Federal Emergency Management Agency (FEMA): *Staffing for Adequate Fire and Emergency Response Grants (SAFER)*
 - \$2.58 million Department of Justice, Community Oriented Policing Services (COPS): *COPS Hiring Grant Program*
 - \$2.9 million Department of Commerce, Economic Development Administration: *Downtown Waterfront Redevelopment Project*
- City of Longview, Washington
 - \$2.8 million Department of Transportation, Federal Transit Administration: *Downtown Transit Center Expansion*
 - \$832,000 Department of Transportation, Federal Transit Administration: *Biodiesel Buses*
 - \$750,000 Department of Transportation, Federal Highway Administration TAP Program: *Downtown Streetscape*
 - \$800,000 Department of Homeland Security, Assistance to Firefighters: *Computer Aided Dispatch*
 - \$450,000 Department of Justice, Community Oriented Policing Service (COPS): *COPS Meth Initiative*
 - \$663,984 Department of Justice, Community Oriented Policing Services (COPS): *Three Police Officers*
 - \$1.4 million Department of Transportation, Federal Transit Administration: *Biodiesel Buses*
 - \$1.3 million Department of Commerce, Economic Development Administration: *Industrial Park Access Project*
- City of Battle Ground, Washington
 - \$275,000 Department of Transportation, Federal Highway TAP: *Chelatchie Prairie Rail to Trail*
 - \$1.9 million (savings) Department of Transportation, Recovery Zone Bonds: *Scotton Way*



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- \$500,000 Department of Transportation, Federal Highway: *North Parkway Construction*
- \$7 million Department of Agriculture Rural Development: *Lagoon Decommissioning Loan*

- Salem-Keizer Transit
 - \$2.8 million Department of Transportation, Federal Transit Administration: *Keizer Transit Center with Sustainable Geothermal and Solar Components*
 - \$589,300 Department of Transportation, Federal Transit Agency: *Paratransit Buses*

- City of Sherwood, Oregon
 - \$200,000 Environmental Protection Agency, Brownfields Assessment: *Public Works Facility*
 - \$250,000 Department of Justice, Community Oriented Policing Services (COPS): *Interoperable Communications Equipment*

This sampling of grant successes illustrates the broad range of funding accounts we track and the network of contacts we have within the federal government. In total, our clients receive the following comprehensive service when it comes to grants:

1. Monitor, track and notify clients of upcoming grants.
2. Meet with federal agency grant specialists to discuss grant criteria.
3. Review, draft and edit grant applications.
4. Coordinate grassroots support, secure congressional letters of support and other stakeholder support for grant requests.
5. Provide additional advocacy through direct engagement from the Congressional delegation.

(iv) Subcontractors

Because of CFM's deep bench of talent and assets on the ground in both DC and Oregon, we do not intend to use subcontractors to fulfill any part of the tasks described under the scope of work.

4.3.2 PROJECT APPROACH AND UNDERSTANDING

4.3.2.1 Overview

CFM is dedicated to a multi-faceted strategy for success. Sometimes lobbyists want to talk first. We set out to listen first. While CFM understands the scope of Beaverton's priorities, we know your continued and constant input is crucial to a successful outcome. We will work in a collaborative way with you and your team to craft a comprehensive federal agenda.

If we are selected to represent Beaverton, our first step would be to spend time with Beaverton officials and focus on the issues the City hopes to accomplish in Washington, DC.

This is a fundamental principle for us – conducting research is a critical first step in representing any client. We suggest initiating interviews with City officials and staff to examine the variety of projects and legislative objectives available to you. We often follow these internal sessions with interviews with key policymakers and staff – interviews that focus on their desires and perceptions, which include a universe of competing



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priorities. This is a key step, especially now that our focus has shifted from earmarks to grants and policy items.

Your CFM federal team of professionals will work daily on the City's behalf in the following areas:

- Developing a strategic federal agenda and political outreach plan;
- Tracking, researching and communicating with federal agencies to identify grant opportunities;
- Coalition building on the local and national level;
- Coordinating advocacy with the Oregon Association of Counties and the National League of Cities;
- Developing policy through the legislative (via Congress) and regulatory (via the administration) process;
- Providing access to key decision makers and leaders in Washington, DC;
- Providing opportunity for testimony before Congressional committees;
- Securing grant awards, authorizations, and report language; and,
- Drafting legislation.

4.3.2.2 Relationships with Beaverton Staff

(i) Introduce Grant Opportunities

Our grant work is point of pride for CFM. CFM's grant specialist will conduct daily, extensive reviews of grant funding opportunities and identify programs that best address Beaverton's projects. The grant specialist will regularly notify Beaverton staff of grant opportunities and provide a detailed analysis of each grant program. Because CFM maintains such close relationships with federal agency staff who draft grant guidelines, Beaverton will often be aware of funding streams before a program is officially announced, and thus avoid short timelines.

Upon award of the contract, CFM will also prepare a targeted list of approximately two dozen grant programs that municipal governments of Beaverton's size and economic demographic could utilize. We will review this targeted list with your Executive Team and prioritize a list of projects to pursue.

(ii and iii) Gauge Beaverton's goals and connect those to funding opportunities; Maintain updates and contact with staff

One of the key advantages of a relationship with CFM is that we know Washington, DC and Oregon and have full-time, highly experienced staff on the ground in both places. Our local presence means we will be "just down the street" when needed. More important, our reservoir of knowledge about issues and grants important to municipal governments will give Beaverton leaders access to a team that can help shape and earn local and national support for your policy initiatives.

Working collaboratively with Beaverton leaders, we will develop a set of grant and policy priorities that serve as your federal policy platform. These priorities will be interwoven strategically with pressing issues facing the federal government.



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As outlined in the schedule of work above, we will take time to meet with Beaverton's Executive Team and elected officials to learn about the City's projects, opportunities, challenges and long-term objectives. CFM will marry these priorities with our list of "targeted grant opportunities" that we will prepare before our first meeting. The targeted grant list will include approximately two dozen likely grant programs within federal departments that Beaverton could tap.

This includes the full range of programs, including water infrastructure, transportation, arts, police and fire, sustainability, brownfields, economic development, farmers' markets, library services and much more. CFM will work closely with Beaverton to refine the list of project and policy items that are of most importance and target our energies appropriately.

CFM's trademark is strategic communications. CFM will provide frequent oral and written updates on a range of legislative and political issues important to Beaverton. Communications will include regular calls, written updates and activity reports, written congressional session reports and oral reports to City staff and Council.

CFM will also regularly visit Beaverton (roughly every two months) to brief the Executive Team and City leaders, tour projects and coordinate Congressional and agency tours.

Schedule of Work

While the annual legislative cycle is fluid and dynamic, the "rough" timeline of services below describes some of the major action items we will complete for Beaverton for the remainder of the year:

June 2017 – CFM will immediately send a team to Beaverton to spend time with City officials and staff to gather and exchange information to better understand your needs, interests and desires; together we will develop a draft, prioritized federal agenda which will be the basis of your 2017 funding requests and legislative action items. We will identify federal programs and grants that meet your needs. After the visit, we will schedule meetings with Oregon delegation staff to review your priorities. After consultation, we will begin working with you to prepare your final agenda, seek out grassroots supporters and create the materials necessary to promote your legislative agenda; identify the most appropriate accounts in the various appropriations and authorization bills where city proposals have the best chance for legislative success.

June - August 2017 – CFM will work closely with Congress through the budget process to protect important funding streams for the City. CFM will coordinate with the City, the Oregon congressional delegation and community leaders to garner support for various projects; produce communication materials; conduct briefings with relevant Capitol Hill staff and members on the legislative agenda; collect letters of support from third-party groups and community advocates; work with the Oregon congressional delegation, administration and staff to advocate for the City's agenda; work with City staff and officials to develop short and long-term grant strategies; shore up support from members of the Oregon congressional delegation and community stakeholders for the City's priorities.



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If appropriate, CFM will organize a DC trip for Beaverton officials to meet with Oregon congressional delegation, relevant House and Senate Committee staff, Departments of Transportation, Justice, Commerce, EPA, Housing, and others; as part of the trip, CFM will coordinate the DC trip schedule, trip memo, background information on political and legislative environment, provide biographical information on meeting participants, prepare lobby documents and pre-brief offices on meeting "asks" to ensure productive use of time; act to shore up support from members of the Oregon delegation and stakeholders for federal agenda; target grant announcements and coordinate grant submissions with active participation from the congressional delegation.

August 2017 – As August is a month-long congressional recess, CFM will coordinate tours and briefings in Beaverton for relevant congressional staff; update DC and district staff on the status of your legislative agenda and projects. Rubin, Skipper and Garrett will visit to meet with City staff and review status of projects and begin planning for the upcoming fiscal year.

September 2017 – Work with the Congressional delegation to secure federal grants; monitor twelve appropriations bills moving through congress and conference committees; advocate for federal programs included on the federal agenda; continue to monitor grant announcements and coordinate support letters for projects; coordinate grassroots support campaign for regional projects; monitor, advocate for or oppose legislation included on the City's legislative agenda.

October - December 2017 – The CFM team will visit Beaverton to spend time with City staff to exchange information regarding the status of the 2017 agenda and start planning 2018; together we will develop a draft federal agenda which will be the basis of your 2018 project and policy requests and legislative action items; identify federal programs and grants that meet your needs; Rubin will make a year-end, in-person presentation to Council.

In addition to the timeline above, CFM would perform the following functions throughout the year:

- Provide frequent updates to City officials and staff on status of grant projects;
- Closely coordinate with the City staff and other officials, perhaps even on a daily basis, to ensure timelines and tasks are being adequately met;
- Coordinate with other regional entities, including state and local elected officials, to help develop region-wide support for existing and new City projects;
- Research new funding opportunities for the City that may arise, including grants, loans and infrastructure package dollars; and
- Provide frequent legislative and political updates and analysis to City officials and staff.

(iv and v) Develop tools to market Beaverton's proposals; Review grants and assist with grant writing

CFM will work closely with Beaverton staff throughout the application process, from before a grant opportunity opens to organizing a ribbon cutting event after a project is dedicated. This comprehensive strategy includes meeting directly with federal agency staff to receive specific guidance, contacting previous



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successful applicants for additional suggestions, drafting grant applications and providing strategic edits to grant proposals.

CFM will create “lobby documents” that clearly and concisely tell the project’s story and lay out the challenges and benefits of a project. In addition, CFM will work with the congressional delegation and other stakeholders to secure letters of support on behalf of the project and ask Members of Congress to place timely phone calls to key agency officials in support of your grant (sometimes called phone-marking).

Two recent success stories illustrate how CFM would work with Beaverton staff and elected officials in taking grant services to the next level.

RiverCities Transit is owned and operated by our client, the City of Longview Washington. In 2016, we were proud to secure two grants for RiverCities Transit, including \$2.8 million to expand a Downtown Transit Center and \$832,000 to replace two biodiesel buses in Longview. The grant program was oversubscribed 8:1 and only 61 projects were awarded nationwide. Despite the long odds and immense nationwide competition, RiverCities Transit was the only entity in the country to secure two grants in the 2016 round.

RiverCities Transit is a small operation with only 16 buses and few administrative staff. CFM took on the responsibility to draft the grant proposal from scratch, schedule meetings with the Federal Transit Administration, provide tours and secure letters of support from the Congressional delegation, strategically target phone calls in support of the grant and ultimately work with the congressional delegation and City on press releases announcing the award. The \$3.6 million total award was a shot in the arm to the Longview economy and transit system and CFM was proud to play a role in the effort.

Similarly, in 2016, CFM helped Tigard secure a \$2.1 million Department of Commerce Economic Development Administration (EDA) grant, one of the largest EDA grants in the region, to spur economic development in its 138-acre commercial/industrial area called the Hunziker Core. The Hunziker Core is underdeveloped and underutilized, and lacks the public infrastructure necessary for development and expansion. CFM worked with the City of Tigard and Congressional delegation for nearly two years to build support for the project. Efforts included scheduling site tours with Members of Congress, EDA officials and state elected officials and staff. We strategically utilized key City staff, the Mayor of Tigard and other local business stakeholders to effectively tell the full story of the project. As such, we prepared talking points, one pagers, maps and other information to complement on-the-ground tours. Because CFM has offices in Portland and DC, we coordinated multiple contacts with both regional and national EDA decision makers.

After CFM’s state lobby team secured \$1.5 million from the Oregon Legislature, we worked directly with City staff to draft and edit its EDA grant application, seek out information from other successful applications and submit the proposal to EDA with strong Congressional support and buy-in. We also had multiple congressional offices weigh in at key times in the review process.



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The EDA Public Works program has limited funding, with only \$100 million available nationwide. Thus, the program is significantly oversubscribed and competition is fierce. CFM's efforts helped to differentiate Tigard's project from the many other competing priorities. Ultimately, EDA announced the \$2.1 million award in September 2016. The project is anticipated to create 150 to 300 high skill, high wage jobs and spur more than \$32 million in private sector investment.

These are just two examples of how CFM works closely with our clients to shepherd a project through the federal process. Our comprehensive approach has yielded positive results for our clients across the Pacific Northwest, and we would be honored to bring these services to the City of Beaverton.

4.3.2.3 Relationships with External Stakeholders

(i) A positive, bi-partisan relationship with legislators and federal program staff

Relationships are important when it comes to a sophisticated advocacy program. Because we are an Oregon firm with a full-time office in Washington, DC, we work on a daily basis with the Oregon delegation and its staff, as well as other key players on Capitol Hill and in numerous agencies. The Oregon delegation knows and trusts us.

We pride ourselves on being a bipartisan firm. Our CFM team includes Democrats, Republicans and Independents. Regardless of party affiliation, our staff is able to work both sides of the aisle when working with elected officials.

We work hard to maintain the bipartisan relationships we have spent years cultivating. In our view, the best way to keep our relationships fresh is to stay in constant contact with those who have influence. Our team of lobbyists stays in regular contact with those who will be Beaverton's best allies and with those who will have influence over its federal agenda priorities. In addition, we maintain deep relationships with those outside of the Oregon delegation, including key Congressional leaders, committee members and influential Congressional and agency staff.

CFM has strong relationships with key Members of the Oregon delegation. Our relationships include:

Senator Wyden, Oregon's senior Senator and lead Democrat on the Finance Committee, plays a pivotal role in shaping legislation important to the Pacific Northwest. CFM has worked closely with Senator Wyden and his staff for decades. CFM's president, Gary Conkling, served as Wyden's first Chief of Staff during his time in the House of Representatives and remains a close counselor. Gary helped Wyden land a coveted spot on the House Energy and Commerce Committee as a freshman House member and was responsible for hiring and training Wyden's staff. CFM's Joel Rubin has great relationships with numerous Wyden staffers, including Jayme White, the Senator's lead international trade staffer on the Finance Committee, Sarah Bittleman (Resources), Dave Berick (Energy), Isaiah Akin (Special Projects) and Trevor Jones (Transportation).

Senator Merkley, a member of the powerful Appropriations Committee, is the Ranking Member on the Agriculture Subcommittee and secured slots on the Energy and Water, Labor, Health and Human Services and Interior and Environment Subcommittees. CFM has close ties with Senator Merkley and his staff. Gary



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Conkling worked closely with Merkley during his years as an Oregon state legislator. Joel Rubin enjoys a good working relationship with Merkley, Michael Zamore (Chief of Staff), Jeremiah Baumann (Legislative Director) and Ben Ward (Appropriations) as well as a number of the Senator's district staff.

Congresswoman Suzanne Bonamici, a rising leader in the Democratic Party, continues to serve on the House Education and Workforce Committee and influence policy decisions through her position on the Subcommittee on Higher Education and Workforce Training. CFM has strong ties to Bonamici going back to her days in the state legislature. In DC, we work with Bonamici and her team on a regular basis. We have great relationships with her top staff Rachael Bornstein (Chief of Staff), Allison Smith (Legislative Director) and Sarah Round (Transportation).

Congressman Greg Walden recently secured the Chairmanship of the House Energy and Commerce Committee. Walden is a powerful member of House leadership and has a close relationship with Speaker Ryan. Walden will be a key ally in getting any agenda through the Republican controlled House. CFM has worked with Walden for decades and has a good relationship with the Republican leader. CFM's newest addition, Kirby Garrett, worked for Walden for four years and has close relationships with the entire Walden team.

Congressman Peter DeFazio is the lead Democrat on the Transportation and Infrastructure Committee. CFM has a good relationship with the Congressman, Kathy Dedrick (Chief of Staff) and Kris Pratt (Legislative Director).

Congressman Earl Blumenauer is the Oregon delegation's primary advocate for alternative transportation and could be a key partner on sustainability projects. CFM has a close relationship with Congressman Blumenauer and his senior staff.

Our work for clients goes beyond legislative activities and reaches into the administrative/regulatory arena. We regularly work with agencies such as the Departments of Transportation; Housing, Health & Human Services; Labor; Justice; Defense; Treasury; Education; Agriculture (U.S. Forest Service); Environmental Protection Agency and the Interior (National Park Service & BLM).

(ii) A history of substantive contact with federal offices of interest to the City

Within dozens of federal programs, CFM has good personal contacts and relationships with department heads and Grant Specialists. Specifically, we meet and communicate on a regular basis with agency staff from the following grant programs that have particular importance to the City of Beaverton:

- *Transportation:* FASTLANE (freight), TIGER, Bus and Bus Facilities, Low No Emissions, Capital Investment Grants (New Starts), Federal Lands Access Program, University Transportation Centers
- *Commerce:* Economic Development Administration
- *Justice:* Byrne JAG, Second Chance Act, COPS, Body-Worn Camera
- *Housing:* CDBG, HOME, Choice Neighborhoods, Continuum of Care



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- *Environmental Protection Agency:* Brownfields Assessment and Cleanup, Urban Waters, WIFIA
- *Labor:* Trade Adjustment Assistance and Veterans Workforce Programs
- *Bureau of Reclamation:* WaterSmart
- *FEMA:* Assistance to Firefighters and SAFER
- *Administration for Children and Families:* Street Outreach Program
- *Agriculture:* Farmers Market Promotion and SNAP, Farm to School
- *National Endowment for the Arts:* Art Works, Our Town
- *Institute of Museum and Library Services:* Museums for America

These relationships, along with our team's experience and expertise, have helped our clients secure the tens of millions of dollars in grant funding listed in the grants section above.

(iii and iv) An effective working relationship with the state and national organizations and interest groups; Coordination and effective working relationship with key staff of an organization

In addition to agency contacts, we have spent time working with coalitions and associations important to Beaverton. Because we represent other municipal clients at the federal level, we have relationships with staff of the National League of Cities (NLC), Conference of Mayors (COM), Association of Oregon Counties, the National Association of Counties (NACo), the National Conference of State Legislatures, the National Association of Clean Water Agencies (NACWA) and Coalition for America's Gateways and Trade Corridors (CAGTC).

We attend monthly NACo Washington Representative briefings in Washington DC and interact closely with NACo staff on a broad spectrum of issues, including transportation, housing, criminal justice and natural resources. We coordinate with AOC on Secure Rural Schools and PILT funding. We team up with the COM and NLC in support of CDBG, HOME, COPS and Byrne funding and protecting municipal bonds. We also work with CAGTC in support of TIGER and FASTLANE funding. We worked closely with NACWA to pass stormwater fee legislation important to Vancouver and Longview. We know that collaboration on some issues is important, and we develop strategies for clients to align with associations to leverage broader support.

Engagement in the Political Process

CFM has a Political Action Committee (PAC) and we make regular contributions to members of the Oregon delegation and others. CFM is a non-partisan, politically neutral firm. We use our PAC to support candidates that support the goals and objectives of our clients. This allows CFM, and CFM's clients, to be active participants in the political process.

4.3.2.4 Conflicts of Interest

(i) Policy differences with multiple clients

CFM takes very seriously the issue of actual and potential client conflicts of interest. Operating with the highest degree of ethics has always been a hallmark of CFM. It is CFM's belief that all potential conflicts of interest should be addressed early on and in a direct dialogue with clients and other parties involved. CFM has carefully reviewed its current client list and concluded there would be no conflict should CFM be



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fortunate enough to contract with Beaverton. CFM approaches the issue of conflicts by following these four basic rules:

1. If CFM had a specific and direct conflict here, CFM would not submit a response to the RFP.
2. If CFM identifies a conflict, either an actual one or a potential one, CFM sets out to identify the actual or potential conflict to a client before it is reported from a third party.
3. Then CFM works, in a straightforward and honest manner, with the client to resolve the actual or potential conflict.
4. If it cannot be resolved, CFM recedes from the work that creates the actual or potential conflict.

(ii) Multiple clients, same grant program

On occasion, CFM has had more than one client applying for projects within the same grant program. In these cases, CFM performs the same level of service it would otherwise provide to each client, including actively engaging the congressional delegation and federal agencies. While it's CFM's job to best position a project for success, ultimately it is up to the Congressional office to choose which project it supports and the federal agency to select awardees. CFM would not favor one project over another client's project. In a recent case, two of our clients were awarded grant funds in the same round, Tigard and Sherwood. Both cities received a Brownfields Assessment grant in the 2015 grant cycle and we actively advocated for both.

(iii) Sharing helpful information between clients

In terms of information potentially being helpful from one client to another, there is a clear policy we undertake – we ask our client if it is okay to share the information. For example, we knew the City of Longview had prepared a successful EDA application in 2010 and some of the content may be helpful to Tigard in 2016. CFM asked Longview if we could share the application with Tigard. Longview was more than happy to release the grant proposal contents and Tigard used some of the generic information to help complete the application. If Longview objected, we would not have shared the information. We have shared information between clients on a handful of occasions, but never without the explicit agreement of the sharer.

4.3.3 RELEVANT EXPERIENCE AND REFERENCES

CFM References

City of Tigard

Marty Wine, City Manager
13125 SW Hall Boulevard
Tigard, Oregon 97223
(503) 718-2486
marty@tigard-or.gov

CFM has provided federal lobbying services for Tigard since 2011. CFM works with Tigard on all aspects of the federal legislative and grant process from start to finish, including working with the congressional



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delegation and other stakeholders on behalf of the project. Joel Rubin is the lead lobbyist on the contract and Michael Skipper, Kirby Garrett, Page Phillips, Dale Penn and Norm Eder provide support.

Marion County

Barb Young, Government Relations Manager
Marion County Board of Commissioners
451 Division Street NE
Salem, OR 97301
(503) 589-3263
byoung@co.marion.or.us

CFM has provided federal lobbying services for Marion County in Oregon since 2000. Joel Rubin is the lead lobbyist on the contract and Michael Skipper and Kirby Garrett provide support.

City of Vancouver

Jan Bader, Program & Policy Development Manager
City of Vancouver
415 W. 6th Street
Vancouver, WA 98668-1995
(360) 487-8606
Jan.Bader@cityofvancouver.us

CFM has been working on the federal legislative agenda and grant process with the City of Vancouver since 2007. Joel Rubin is the lead lobbyist on the contract and Michael Skipper and Page Phillips provide support.

4.3.3.1 Current Oregon-based Governmental Clients

- Marion County, Oregon
- Tigard, Oregon
- Medford, Oregon
- Pendleton, Oregon
- Salem Keizer Transit

4.3.3.2 Past Governmental Clients Similar to Beaverton

Sherwood, Oregon
Tom Pessemier, Assistant City Manager
22560 SW Pine Street
Sherwood, Oregon 97140
pessemierrt@ci.sherwood.or.us
(503) 925-2302



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► research ► marketing public relations ► public affairs ► federal lobbying ► state lobbying

503.294.9120 | www.cfm-online.com | 1001 SW Fifth Avenue, Suite 1100 | Portland, Oregon 97204

CFM worked for Sherwood from 2009 to 2015. CFM provided a full range of federal lobbying services including earmarks, grants, appropriations, legislation and relationship building. Ultimately, the prosperous economic demographic of Sherwood along with its small size and readiness to move forward on grant applications made it more challenging for the City to compete for federal grants.

4.3.4 MINORITY, WOMEN, EMERGING SMALL BUSINESS PROGRAM

- Is your firm currently certified in the State of Oregon as an M/W/ESB enterprise? If yes, indicate all certification types and your firm's certification number(s). *No*
- Provide a narrative description of your firm's experience, including any innovative or successful measures, promoting M/W/ESB enterprises as partners, subcontractors, or suppliers on previous projects.

CFM is committed to workforce diversity. We have worked with WorkSystems, Inc., metropolitan area community colleges and career colleges and coalitions such as Manufacturing 21 to align available jobs and skilled trade training and ensure training opportunities extend to all under-represented groups in the economy, including minorities, women and returning veterans.

- Provide a list and percentage of total contract dollars spent with M/W/ESB enterprises with which the proposer's firm has had a contractual relationship during the last 12 months.

Over 12.5% of CFM professional services were contracted out to M/W/ESB enterprises, including Ellen Theodorson, IZO PR, Parini Connects, Passport To Languages and Bev Melven.

- Clearly state what, if any, M/W/ESB enterprise participation goal the proposer believes it can realistically achieve on this project.

Because we will not be subcontracting responsibilities on the Beaverton account, there will not be an opportunity to add additional M/W/ESB enterprises.

- If the proposer identified subcontractors in Section 4.3.1.2 that the proposer intends to use on this project, please specify which subcontractors, if any, are M/W/ESB enterprises. *N/A*
- Describe the actions and strategies the proposer will take to increase M/W/ESB enterprise participation on this project. *N/A*

JOEL A. RUBIN

2724 Blaine Drive

Chevy Chase, MD 20815

Cell: (301) 461-1532, E-mail: Rubin24@yahoo.com

WORK EXPERIENCE

CFM STRATEGIC COMMUNICATIONS, Washington, DC

Partner Federal Affairs, Lobbyist

Jun06 – present

- Work with eleven Pacific Northwest municipal, transportation, education and defense clients to secure federal funds and pursue legislative objectives as prescribed through a deliberate, strategic legislative agenda
- Develop and maintain relationships with Members of Congress, key Congressional staff and Executive Branch officials
- Advocate for, monitor and track legislation pertinent to client objectives and prepare frequent briefings
- Research various federal spending programs, funding levels and program requirements to position client projects and strategic legislative initiatives
- Initiate client development leads and responsible for signing up seven new federal clients
- Author the firm's federal legislative updates, newsletters and client summaries
- Serve as Treasurer to firm's PAC and file all relevant FEC, ethics and lobby disclosure documents

DAVID TURCH AND ASSOCIATES, Washington, DC

Lobbyist

Jan05 – Jun06

- Worked with twelve private and public sector clients to secure federal appropriations and advance their legislative objectives
- Performed tasks similar to CFM VP of Federal Affairs described above

CONGRESSMAN BRIAN BAIRD (D-WA), Washington, DC

Legislative Director

Apr03 – Jan05

- Supervised and trained legislative staff, including four Legislative Assistants
- Developed and implemented a legislative strategy that reflected the needs of the district
- Responsible for three major Committee assignments – Transportation and Infrastructure, Small Business and Budget
- Monitored and tracked votes, floor procedures and schedule
- Coordinated legislative activities with press secretary to publicize accomplishments

Senior Legislative Assistant

May02 – Apr03

- Assisted the Legislative Director with supervision of legislative staff
- Worked directly with Legislative Director, Chief of Staff and Member to devise legislative strategy
- Continued all Legislative Assistant duties listed below

Legislative Assistant

Sep00 – May02

Emphasis: Taxes, Budget, Banking, Trade, Defense, Labor, Small Business and related Appropriations

- Directly advised the Congressman on legislation pertaining to areas of emphasis
- Researched, developed, introduced and tracked legislation
- Prepared speeches, talking points and briefing materials
- Drafted correspondence to constituents and government officials
- Consulted with lobbyists, met with constituents and represented the Congressman at various functions

Legislative Correspondent/Systems Administrator

Mar00 – Sep00

- Corresponded with constituents through letters and by telephone
- Maintained the office database and computer network

PERKINS COIE LLP, Washington, DC
FEC Compliance Specialist

Feb99 – Mar00

- Responsible for all aspects of financial reporting and compliance for a variety of federally and non-federally regulated entities:
 - Prepared FEC reports for two Members of Congress and three political action committees with cumulative contributions over three million dollars
 - Prepared non-federal reports for the DCCC, DSCC and three other non-federal committees in over twenty five states
- Tracked and summarized campaign finance laws in all fifty states
- Automated the firm's reporting and filing process by creating and integrating data templates with Excel spreadsheets
- Complied with all federal and state laws and weekly reporting deadlines for the clients of the firm
- Maintained daily contact with campaign staff to coordinate committee activities

MARYLAND DEMOCRATIC PARTY, Annapolis, MD
Office Manager and Assistant Comptroller

Sep98 – Feb99

- Assisted in coordination of statewide Get-Out-The-Vote activities during the 1998 election season, including a seven county bus tour, mass mail marketing and statewide central committee meetings
- Acted as a liaison for ten Maryland federal and state election campaigns as a part of the statewide coordinated campaign
- Responsible for production and compliance of federal and state reports of receipts and disbursements
- Paid and recorded all monthly bills
- Scheduled, managed and coordinated campaign activities for over 15 volunteer workers
- Administered the offices Novell LAN network, Maryland Party web page, office supplies and campaign database software

GOLDKLANG, CAVANAUGH, AND ASSOCIATES P.C., Fairfax, VA
Staff Accountant

Feb97 – Sep98

- Continually coordinated and managed over 300 audit engagements
- Trained and Supervised staff accountants for a variety of audit and tax assignments
- Scheduled audit engagements to meet client and tax deadlines
- Worked directly with accountants, managers, and controllers in order to successfully communicate and meet the demands of clients
- Planned detailed audits in accordance with generally accepted auditing standards
- Prepared federal and state (MD, VA and DC) income tax returns and extensions utilizing 'Pro Series' tax package software
- Provided financial planning suggestions to ensure fiscally prudent operations

EDUCATION AND ACTIVITIES

- B.S. in Accounting, Frostburg State University, 1996
- Dual minor, Political Science and Business Administration
- Staff writer for the Frostburg State University newspaper, "The Bottom Line"
- President of the Interfraternal Council and member of the school 'President's Advisory Board'

COMPUTER SKILLS

- Proficient in Microsoft Office, WordPerfect, Quickbooks, Quicken, CapCorr and other database software, PageMaker and researching the Internet